

# Effective Meetings

Perfect Customer Experience Best Practices



## Guide to Conducting Effective Meetings

There are several ways to help conduct an effective meeting. By using some basic methods and establishing guidelines for meetings, you can gain effectiveness, reduce time, and improve efficiency. The following steps will assist you.

### Selecting Participants

The decision about who attends meetings depends on what you want to accomplish. This may seem too obvious to state, but it's surprising how many meetings occur without the right people there. Don't depend on your own judgment about who should come. Ask several other people for their opinion. If possible call each person to tell them about the meeting, its overall purpose and why their attendance is important. Follow-up your call with a meeting notice, including the purpose of the meeting, where it will be held and when, the list of participants and whom to contact if they have questions. Send out a copy of the proposed agenda along with the meeting notice. Have someone designated to record important actions, assignments and due dates during the meeting. This person should ensure that this information is distributed to all participants shortly after the meeting.

### Developing Agendas

Develop the agenda together with key participants in the meeting. Think of what overall outcome you want from the meeting and what activities need to occur to reach that outcome. The agenda should be organized so that these activities are conducted during the meeting.

In the agenda, state the overall outcome that you want from the meeting. Design the agenda so that participants get involved early by having something for them to do right away and so they come on time. Next to each main topic, include the type of action needed, the type of output expected (decision, vote, action assigned to someone), and time estimates for addressing each topic. Ask participants if they'll commit to the agenda and keep the agenda posted at all times. Don't overly design meetings; be willing to adapt the meeting agenda if members are making progress in the planning process.

Think about how you label an event, so people come in with that mindset; it may pay to have a short dialogue around the label to develop a common mindset among attendees, particularly if they include representative from various cultures.

## **Opening Meetings**

Always start on time. This respects those who showed up on time and reminds late-comers that the scheduling is serious. Remember to welcome attendees and thank them for their time.

Be sure to review the agenda at the beginning of each meeting, giving participants a chance to understand all proposed major topics, change them and accept them.

The meeting leader will want to model the kind of energy and participation level needed by meeting participants. Also, be sure to clarify roles in the meeting. Let everyone know who is chair, note taker or scribe, customers, interested parties and so on.

## **Establishing Ground Rules for Meetings**

You don't need to develop new ground rules each time you have a meeting, surely; however, it pays to have a few basic ground rules that can be used for most of your meetings. These ground rules cultivate the basic ingredients needed for a successful meeting.

Four powerful ground rules are:

- Participate
- Get focus
- Maintain momentum
- Reach closure

List your primary ground rules on the agenda. If you have new attendees who are not used to your meetings, you might review each ground rule.

Keep the ground rules posed at all times.

## **Time Management**

One of the most difficult facilitation tasks is time management, time seems to run out before tasks are completed. Therefore, the biggest challenge is keeping momentum to keep the process moving. You might ask attendees to help you keep track of the time.

If the planned time on the agenda is getting out of hand, present it to the group and ask for their input as to a resolution.

## **Evaluations of Meeting Process**

It's amazing how often people will complain about a meeting being a complete waste of time, but they only say so after the meeting. Get their feedback during the meeting when you can improve the meeting process right away. Evaluation a meeting only at the end of the meeting is usually too late to do anything about participants' feedback.

Every couple of hours, conduct 5-10 minutes "satisfaction checks". In a round-table approach, quickly have each participant indicate how they think the meeting is going.

## **Evaluating the Overall Meeting**

Leave 5-10 minutes at the end of the meeting to evaluate the meeting; don't skip this portion of the meeting. Have each member rank the meeting from 1-5, with 5 as the highest, and have each member explain their ranking.

## **Closing Meetings**

Always end meetings on time and attempt to end on a positive note. At the end of a meeting, review actions and assignments, and set the time for the next meeting and ask each person if they can make it or not (to get their commitment).

Clarify that meeting minutes and/or actions will be reported back to members in at most a week, this helps to keep momentum going.

## **Meeting Ground Rules**

- Plan meetings carefully :who, what, when, where, why, how many (count the cost)
- Send and review agenda topics in advance
- Route agenda items for review and prioritization prior to the meeting
- Route an agenda items briefs in advance for review by all members
- Start on time and set clear time limits
- Record minutes, prepare and route within 24 hours
- Include old business, new business and action items in the minutes
- Begin each meeting with a review of ground rules until they become the norm
- Review previous meeting action items, including closeout or re-suspense of due dates
- Establish action items with assignment: who, what, when
- Move on without further discussion when an action is assigned or a decision is made
- If we are not prepared, move on to the next item and revisit next meeting
- Set the date and place of the next meeting and develop a preliminary agenda
- Evaluate the meeting
- End on time and close the meeting crisply and positively

## **Meeting Affirmations**

- I will arrive on time, ready for work
- I will check my ego at the door
- I will pay attention to the energy in the room
- I will stay focused on the purpose and topic at hand
- I will say what I need to say
- I will be honest and direct
- I will make decisions and take a stand on issues
- I will support only one person speaking at a time
- I will listen, hear and respect others opinions
- I will let fellow members complete their statements/thoughts
- I will challenge ideas, not people, to make them work
- I will agree with others only if I truly mean it
- I will help drive solutions
- I will respect confidentiality
- I will be loyal to the absent
- I will help keep meetings on task and on time
- I will not procrastinate, pass the buck or ask for unnecessary reports
- I will not use my blackberry or cell phone during meetings, and turn both to silent